

Creating a Referrals Report for: The Number of Days between Date Referred to Date Scheduled

The following Guide provides information on how to calculate and obtain the number of days between the date that a Referral was generated and the date that the referral was scheduled.

- Depending on the number of Referrals you need to audit or report on, select the appropriate category. To include all Referrals, select the **All** Category in your SENT or RECEIVED Referral Worklist:



- Sort the Worklist by clicking on the heading of either “Date Referred” or “Scheduled” depending on your need. (You can also sort the Worklist once you create your Excel spreadsheet).

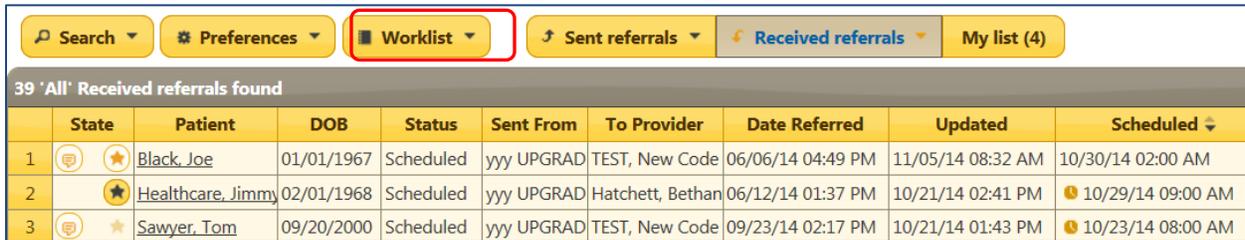


	State	Patient	DOB	Status	Sent To	To Provider	Date Referred	Updated	Scheduled	Contacted
1		CNRTEST, JIMMY	06/02/1981	Cancelled (no show)	YYY Steve Test Clinic	Test, Training A MD	02/28/13 03:30 AM	02/28/13 03:37 AM	05/01/13 08:30 AM	Yes
2		PATIENT, Penny	02/01/1969	Scheduled	YYY Steve Test Clinic	TEST Doctor	02/28/13 04:20 AM	02/28/13 04:26 AM	04/05/13 05:00 AM	Yes
3		CNRTEST, BETTY	01/15/1974	Marked Complete	YYY Steve Test Clinic	TEST Doctor 2	02/28/13 03:27 AM	02/28/13 03:50 AM	04/05/13 01:20 AM	Yes
4		PATIENT, Penny	02/01/1969	Scheduled	YYY New Code Specialty	TEST, Specialist 2	02/26/13 04:29 PM	02/27/13 09:50 AM	03/14/13 01:30 AM	No
5		TESTING, Katie	05/15/1985	Scheduled	YYY Steve Test Clinic	1-No Preference	02/28/13 07:43 AM	02/28/13 07:54 AM	03/06/13 10:00 AM	Yes
6		CNRTEST, MEEKS	02/02/2012	Scheduled	YYY New Code Specialty	Hatchett, Bethany C MD	02/20/13 10:32 AM	02/21/13 06:23 PM	03/01/13 03:00 PM	Yes
7		Black, Joe	01/01/1967	Scheduled	YYY Steve Test Clinic	Test, Training A MD	02/28/13 12:26 AM	02/28/13 12:31 AM	02/28/13 12:30 PM	Yes

Hint: You can also use the **Search** feature to narrow down the list of Referrals.

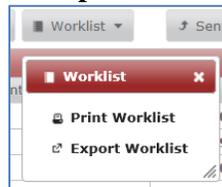


- Click on Worklist

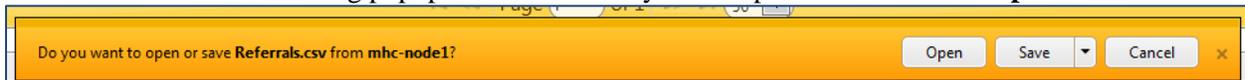


	State	Patient	DOB	Status	Sent From	To Provider	Date Referred	Updated	Scheduled
1		Black, Joe	01/01/1967	Scheduled	yyy UPGRAD	TEST, New Code	06/06/14 04:49 PM	11/05/14 08:32 AM	10/30/14 02:00 AM
2		Healthcare, Jimmy	02/01/1968	Scheduled	yyy UPGRAD	Hatchett, Bethan	06/12/14 01:37 PM	10/21/14 02:41 PM	10/29/14 09:00 AM
3		Sawyer, Tom	09/20/2000	Scheduled	yyy UPGRAD	TEST, New Code	09/23/14 02:17 PM	10/21/14 01:43 PM	10/23/14 08:00 AM

- The following screen will display. Click on **Export Worklist**.



- You will see the following popup at the bottom of your computer screen. Select **open**



- Typically, the spreadsheet **columns** will need to be adjusted to display the information in each cell.

	A	B	C	D	E	F	G	H	I	J	K	L
1	State	Patient	DOB	Status	Sent From	To Provider	Date Referred	Updated	Scheduled	Contacted	Assigned to User	
2	Not Cance	Black Joe	1/1/1967	Schedulec	yyy UPGR	TEST New	#####	#####	#####	No	Steve Spieker	
3	Not Cance	Healthcar	2/1/1968	Schedulec	yyy UPGR	Hatchett E	#####	#####	#####	Yes	Chris Ford	
4	Not Cance	Sawyer To	#####	Schedulec	yyy UPGR	TEST New	#####	#####	#####	Yes		
5	Cancelled	Test Septe	#####	Cancelled	yyy UPGR	Hatchett E	#####	#####	#####	Yes		

7. Once the columns have been adjusted, right-click on the **Updated** column and select **Delete**.

#	Patient	Status	Sent To	Referred	Updated	Contacted	Assigned User
1	CNRTEST, JIMMY	Cancelled (no show)	YYY Steve Test Clinic	2/28/2013	2/28/2013	2013	Yes
2	PATIENT, Penny	Scheduled	YYY Steve Test Clinic	2/28/2013	2/28/2013	2013	Yes
3	CNRTEST, BETTY	Marked Complete	YYY Steve Test Clinic	2/28/2013	2/28/2013	2013	Yes
4	PATIENT, Penny	Scheduled	YYY New Code Specialty	2/26/2013	2/27/2013	2013	No
5	TESTING, Katie	Scheduled	YYY Steve Test Clinic	2/28/2013	2/28/2013	2013	Yes
6	CNRTEST, MEEKS	Scheduled	YYY New Code Specialty	2/20/2013	#####	2013	Yes
7	Black, Joe	Scheduled	YYY Steve Test Clinic	2/28/2013	2/28/2013	2013	Yes
8	TESTING, Katie	Scheduled	YYY Steve Test Clinic	2/28/2013	2/28/2013	2013	No
9	Test, Mary	Scheduled	YYY New Code Specialty	2/27/2013	#####	2013	No
10	CNRTEST, BETTY	Scheduled	YYY New Code Specialty	2/19/2013	2/22/2013	2013	Yes

8. **IMPORTANT: WE ALSO STRONGLY RECOMMEND THAT YOU ALSO DELETE THE “PATIENT” and “DOB” COLUMN TO MAINTAIN PATIENT CONFIDENTIALITY AND ELIMINATE A POTENTIAL HIPPA VIOLATION.**

9. **CREATING THE NET DAYS FORMULA IN THE SPREADSHEET:**

- Create an additional column
- Title the column “**Net Days**” (or title of your choice).
- Create the following formula for the cells in this column:
=IF(F2="", "", NETWORKDAYS(E2,F2))

	D	E	F	G	H	I
	To Provider	Date Referred	Scheduled	Contacted	NET DAYS	
	Tucker Cameron M MD	9/22/2014 15:31	9/25/2014 3:30	Yes	=IF(F2="", "", NETWORKDAYS(E2,F2))	
	TEST New Code Specialist	9/23/2014 14:17	10/23/2014 8:00	Yes	23	
	Hatchett Bethany C MD	6/12/2014 13:37	10/29/2014 9:00	Yes	100	

IMPORTANT TO NOTE: This formula was based on deleting the **Patient**, **DOB** and **Updated** columns from the initial spreadsheet. Therefore, the “**E2,F2**” within the parenthesis in the example above will need to be changed depending on the corresponding columns for **Date Referred** and **Scheduled** in your spreadsheet.

This will calculate the number of days between when the date the Referral was generated and the date it was scheduled.

10. You will be able to use this format for all the other rows that have a Scheduled appointment within the **Scheduled** column. Copy and Paste the formula into the corresponding rows (or click and drag the initial cell down through the descending cells in column G). *** The example below was generated after the “Assigned to User” column was removed.*

	A	B	C	D	E	F	G
	State	Status	Sent From	To Provider	Date Referred	Scheduled	Net Days
1	Not Cancelled	Scheduled	yyy UPGRADE TESTING PCP	TEST New Code Specialist	6/6/2014 16:49	10/30/2014 2:00	105
2	Not Cancelled	Scheduled	yyy UPGRADE TESTING PCP	Hatchett Bethany C MD	6/12/2014 13:37	10/29/2014 9:00	100
3	Not Cancelled	Scheduled	yyy UPGRADE TESTING PCP	TEST New Code Specialist	9/23/2014 14:17	10/23/2014 8:00	23
4	Cancelled	Cancelled (no show)	yyy UPGRADE TESTING PCP	Hatchett Bethany C MD	9/17/2014 8:04	9/26/2014 9:30	8
5	Not Cancelled	Consult Added	yyy UPGRADE TESTING PCP	Tucker Cameron M MD	9/22/2014 15:31	9/25/2014 15:30	4
6	Cancelled	Cancelled (no show)	yyy UPGRADE TESTING PCP	Tucker Cameron M MD	6/6/2014 16:52	9/18/2014 1:00	75
7	Not Cancelled	Marked Complete	yyy UPGRADE TESTING PCP	TEST Specialist 2	6/6/2014 14:32	6/11/2014 1:00	4

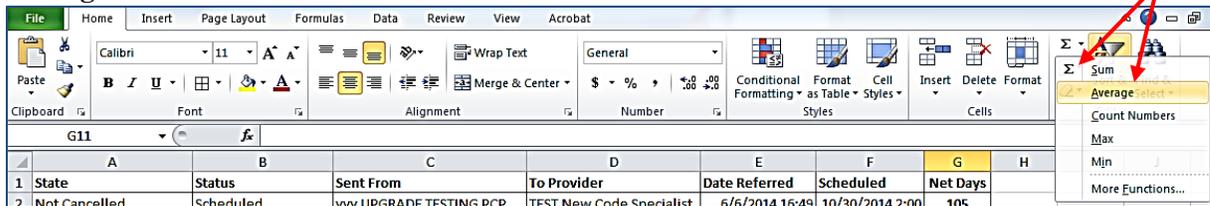
Creating the Average Number of Days

You can create an average number of days from the Referred Date to the Scheduled date through the following steps:

1. Clicking in the cell below the last numbered cell in the **Net Days** column

	A	B	C	D	E	F	G
1	State	Status	Sent From	To Provider	Date Referred	Scheduled	Net Days
2	Not Cancelled	Scheduled	yyy UPGRADE TESTING PCP	TEST New Code Specialist	6/6/2014 16:49	10/30/2014 2:00	105
3	Not Cancelled	Scheduled	yyy UPGRADE TESTING PCP	Hatchett Bethany C MD	6/12/2014 13:37	10/29/2014 9:00	100
4	Not Cancelled	Scheduled	yyy UPGRADE TESTING PCP	TEST New Code Specialist	9/23/2014 14:17	10/23/2014 8:00	23
5	Cancelled	Cancelled (no show)	yyy UPGRADE TESTING PCP	Hatchett Bethany C MD	9/17/2014 8:04	9/26/2014 9:30	8
6	Not Cancelled	Consult Added	yyy UPGRADE TESTING PCP	Tucker Cameron M MD	9/22/2014 15:31	9/25/2014 15:30	4
7	Cancelled	Cancelled (no show)	yyy UPGRADE TESTING PCP	Tucker Cameron M MD	6/6/2014 16:52	9/18/2014 1:00	75
8	Not Cancelled	Marked Complete	yyy UPGRADE TESTING PCP	TEST Specialist 2	6/6/2014 14:32	6/11/2014 1:00	4
9	Not Cancelled	Marked Complete	yyy UPGRADE TESTING PCP	Tucker Cameron M MD	6/6/2014 11:51	6/10/2014 10:00	3
10	Cancelled	Cancelled (no show)	yyy UPGRADE TESTING PCP	TEST New Code Specialist	6/5/2014 16:10	6/6/2014 1:00	2
11							

2. select the **Sum** icon Σ in the upper Right Hand section of the Home screen and then select **Average**.



3. Make sure that the **Average** feature captures all cells in that column.

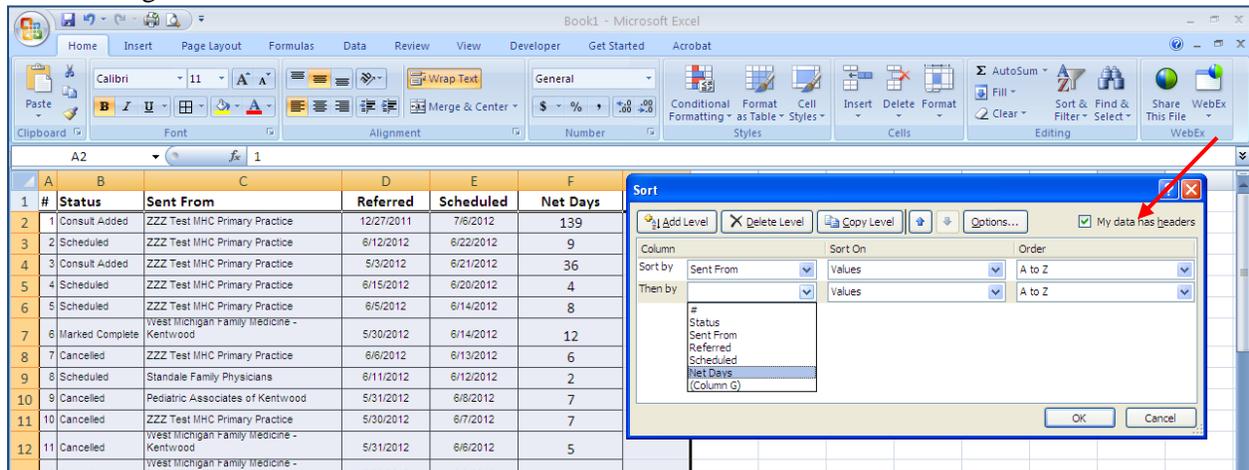
	A	B	C	D	E	F	G	H	I
1	State	Status	Sent From	To Provider	Date Referred	Scheduled	Net Days		
2	Not Cancelled	Scheduled	yyy UPGRADE TESTING PCP	TEST New Code Specialist	6/6/2014 16:49	10/30/2014 2:00	105		
3	Not Cancelled	Scheduled	yyy UPGRADE TESTING PCP	Hatchett Bethany C MD	6/12/2014 13:37	10/29/2014 9:00	100		
4	Not Cancelled	Scheduled	yyy UPGRADE TESTING PCP	TEST New Code Specialist	9/23/2014 14:17	10/23/2014 8:00	23		
5	Cancelled	Cancelled (no show)	yyy UPGRADE TESTING PCP	Hatchett Bethany C MD	9/17/2014 8:04	9/26/2014 9:30	8		
6	Not Cancelled	Consult Added	yyy UPGRADE TESTING PCP	Tucker Cameron M MD	9/22/2014 15:31	9/25/2014 15:30	4		
7	Cancelled	Cancelled (no show)	yyy UPGRADE TESTING PCP	Tucker Cameron M MD	6/6/2014 16:52	9/18/2014 1:00	75		
8	Not Cancelled	Marked Complete	yyy UPGRADE TESTING PCP	TEST Specialist 2	6/6/2014 14:32	6/11/2014 1:00	4		
9	Not Cancelled	Marked Complete	yyy UPGRADE TESTING PCP	Tucker Cameron M MD	6/6/2014 11:51	6/10/2014 10:00	3		
10	Cancelled	Cancelled (no show)	yyy UPGRADE TESTING PCP	TEST New Code Specialist	6/5/2014 16:10	6/6/2014 1:00	2		
11							=AVERAGE(G2:G10)		
12							AVERAGE(number1, [number2], ...)		
13									

4. Select the **Enter** or the **Return** key on your keyboard. The average Net Days will display as in the example below:

	A	B	C	D	E	F	G
1	State	Status	Sent From	To Provider	Date Referred	Scheduled	Net Days
2	Not Cancelled	Scheduled	yyy UPGRADE TESTING PCP	TEST New Code Specialist	6/6/2014 16:49	10/30/2014 2:00	105
3	Not Cancelled	Scheduled	yyy UPGRADE TESTING PCP	Hatchett Bethany C MD	6/12/2014 13:37	10/29/2014 9:00	100
4	Not Cancelled	Scheduled	yyy UPGRADE TESTING PCP	TEST New Code Specialist	9/23/2014 14:17	10/23/2014 8:00	23
5	Cancelled	Cancelled (no show)	yyy UPGRADE TESTING PCP	Hatchett Bethany C MD	9/17/2014 8:04	9/26/2014 9:30	8
6	Not Cancelled	Consult Added	yyy UPGRADE TESTING PCP	Tucker Cameron M MD	9/22/2014 15:31	9/25/2014 15:30	4
7	Cancelled	Cancelled (no show)	yyy UPGRADE TESTING PCP	Tucker Cameron M MD	6/6/2014 16:52	9/18/2014 1:00	75
8	Not Cancelled	Marked Complete	yyy UPGRADE TESTING PCP	TEST Specialist 2	6/6/2014 14:32	6/11/2014 1:00	4
9	Not Cancelled	Marked Complete	yyy UPGRADE TESTING PCP	Tucker Cameron M MD	6/6/2014 11:51	6/10/2014 10:00	3
10	Cancelled	Cancelled (no show)	yyy UPGRADE TESTING PCP	TEST New Code Specialist	6/5/2014 16:10	6/6/2014 1:00	2
11							36
12							

Hints:

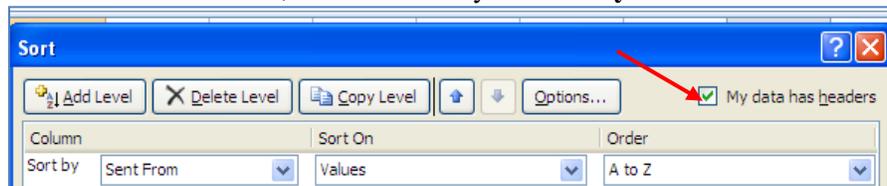
1. You can also **sort** your columns based on need, i.e. by **Net Days**, **Status**, **Sent From**, etc. by selecting the **Sort & Filter** icon.



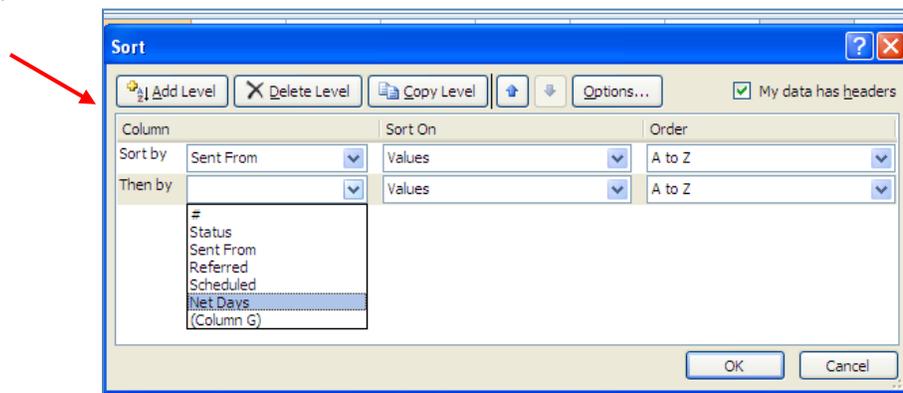
2. If the **Sort & Filter** icon does not display, make sure that you are on the **Home** tab.



3. To view the titles for each column, make sure that you have **My data has headers** box checked.



4. You can also add additional filtering by selecting the **Add Level** button and then selecting additional options.



Note: You can use the **Contacted** and **Assigned to User** Columns to evaluate whether contacting the patient or who the Referral was assigned to impacts the number of days it takes to schedule the appointment.